



State of California  
Franchise Tax Board

STATE OF CALIFORNIA  
**TAX PROGRAM  
ASSISTANT**

OPEN EXAMINATION

Location: Sacramento

Final Filing Date: February 29, 2012

## INTRODUCTION

Mission of the Franchise Tax Board: The purpose of the Franchise Tax Board is to collect the proper amount of tax revenue and operate programs entrusted to us at the least cost; serve the public by continually improving the quality of our products and services; and perform in a manner warranting the highest degree of public confidence in our integrity, efficiency and fairness.

## EEO

An equal opportunity employer to all regardless of race, color, creed, national origin, ancestry, sex, marital status, disability, religious or political affiliation, age, or sexual orientation.

## DRUG FREE STATEMENT

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

## WHO SHOULD APPLY?

Candidates who meet the minimum qualifications as stated below may apply for this examination. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

## FILING INSTRUCTIONS

FINAL FILING DATE TO SUBMIT AN APPLICATION: **FEBRUARY 29, 2012**

Applications (STD. 678) are available at the State Personnel Board's website home page at [www.spb.ca.gov](http://www.spb.ca.gov) or FTB's website at [www.ftb.ca.gov](http://www.ftb.ca.gov).

Applications can be filed either:

**In Person:**  
Franchise Tax Board  
9646 Butterfield Way  
Sacramento Bldg., Exam/Certification Unit  
Sacramento, CA 95827

**By Mail:**  
Franchise Tax Board  
ATTN: Exam/Certification Unit  
P.O. Box 550  
Sacramento, CA 95812-0550

APPLICATIONS **MUST** CONTAIN ORIGINAL SIGNATURES AND **MUST** BE SUBMITTED TO THE ADDRESS INDICATED ABOVE.

Applications (STD.678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered or received via interoffice mail after the final filing date will not be accepted.

2FT07-CA57-1474

## SPECIAL TESTING ARRANGEMENTS

If you have a disability and need special testing arrangements, mark the appropriate box on the application and complete the special testing arrangements questionnaire.

If you have a disability and need special testing arrangements, please call Franchise Tax Board Examination/Certification Unit at (916) 845-3608.

## REQUIRED IDENTIFICATION

Accepted applicants are required to bring either a photo identification card or two forms of signed identification to each phase of the examination.

## SALARY

**Range A** \$1,852.00 - \$2,251.00

**Range B** \$2,074.00 - \$2,519.00

**Range C** \$2,280.00 - \$2,770.00

**Range A.** This range will apply to those individuals who do not meet the criteria for Range B or Range C.

**Range B.** This range shall apply to:

1. Persons who have satisfactorily completed the equivalent of six months of Tax Program Assistant experience. **Or**
2. One year of experience in the following settings (this experience must be beyond that required to satisfy the minimum qualifications of the class):
  - a. Clerical experience in a financial, commercial, or governmental establishment, which may include responsibilities equivalent to leading a small group. **Or**
  - b. Manager or owner of a small business establishment which may include fast food, small office, or shift manager. **Or**
  - c. Telemarketing, receptionist, bank teller, public service, or bookkeeping.

(Education above the 12<sup>th</sup> grade may be substituted for the required experience in Pattern 2, on the basis of 15 semester units of college being equivalent to six months of experience.)

**Range C.** This range shall apply to:

1. Persons who have satisfactorily completed the equivalent of 12 months of Tax Program Assistant (Range B) experience or 18 months of Tax Program Assistant experience. **Or**
2. Two years of experience in any of the following settings (this experience must be beyond that required to satisfy the minimum qualifications of the class):
  - a. Clerical experience in a financial, commercial, or governmental establishment which may include responsibilities equivalent to leading a small group. **Or**
  - b. Manager or owner of a small business establishment, which may include fast food, small office or shift manager. **Or**
  - c. Telemarketing, receptionist, bank teller, public service, or bookkeeping.

(Education above the 12<sup>th</sup> grade may be substituted for the required experience in Pattern 2, on the basis of 15 semester units of college being equivalent to six months of experience.)

When the requirements for the particular criteria are met and upon recommendation of the appointing power, the employee shall receive a rate under the provisions of DPA Rule 599.676.

## ELIGIBLE LIST INFORMATION

An open eligible list will be established for the Franchise Tax Board. The list will be abolished 12 months after it is established unless the needs of the service and conditions of the list warrant a change in this period.

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

**NOTE:** All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the written test date. Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), time base, civil service class title(s), and range, if applicable. College

course information **MUST** include: title, semester or quarter credits, name of institution, completion dates, and degree (if applicable). **Applications/resumes received without this information may be rejected.**

## ADDITIONAL REQUIREMENTS

Applicants should be aware that prior to employment with the Franchise Tax Board a background investigation will be conducted. The investigation will consist of, in part, completion of a questionnaire, fingerprinting and inquiry to the Department of Justice to disclose criminal records. Employment offers will be made prior to completion of the questionnaire. A commitment to hire will not be considered final until the background information has been reviewed and approved by the department.

## MINIMUM QUALIFICATIONS

### Either I

Three months of experience at the Franchise Tax Board performing clerical duties at a level of responsibility equivalent to that of a seasonal clerk.

### Or II

Six months of general clerical experience.

## POSITION DESCRIPTION

Under supervision, performs a variety of specialized clerical duties related to the administration of the Franchise Tax Board's tax program; and to do other related work. Support duties may include: responds in writing or by phone to routine taxpayer inquiries; explains provisions of the state tax laws, policies, procedures, and filing requirements, and processes the least complex accounts within specified guidelines.

Position(s) exist in Sacramento.

## EXAMINATION INFORMATION

### Written Test – Weighted 100%

This examination will consist of a written test weighted 100%. Candidates must attain an overall minimum score of 70.00% in order to be placed on the eligible list.

**Hand-held calculators will be permitted, but will not be provided by the department.**

**Note: Cell phones, palm pilots, and other electronic devices may not be used as a calculator during this examination.**

**CANDIDATES WHO DO NOT APPEAR FOR THE WRITTEN EXAMINATION WILL BE DISQUALIFIED.**

No reschedules or make-ups will be allowed.

## SCOPE OF EXAMINATION

Candidates should be prepared to answer pre-determined, job-related questions identified under the Knowledge, Skills, Abilities, and Personal Characteristics.

## KNOWLEDGE, SKILL, ABILITY, & PERSONAL CHARACTERISTICS

### Knowledge of:

1. IRS and FTB security and disclosure requirements concerning taxpayer privacy and confidentiality of taxpayer information.
2. FTB policies regarding conflict of interest, sexual harassment and workplace violence in order to avoid personal conduct that is inappropriate.
3. Departmental and unit procedures and guidelines to complete workloads in accordance with FTB standards.
4. Basic mathematical operations (addition, subtraction, multiplication, division) to review and process workload.
5. The internet, email, and other basic computer functions to conduct work related activities.
6. The uses and functions of general office equipment (e.g., calculator, copier, fax machine, telephone, etc.) to perform required duties.
7. The structure and content of the English language, including the meaning and spelling of words,

rules of composition and grammar.

8. Basic customer service skills to effectively deal with taxpayers and other customers.

**Skill to:**

1. Accurately and efficiently enter data into a computerized database.
2. Communicate orally using proper English vocabulary and word use to convey information, respond to questions, and give direction to others.
3. Communicate in writing, using proper English grammar, punctuation and spelling, in order to effectively convey information.
4. Review forms for content, accuracy and completeness.
5. Perform a variety of mathematical computations (e.g., formulas and percentages) using a calculator, or computer, or an adding machine.
6. Ask relevant questions in order to help clarify facts and address specific needs or issues.
7. Sort data and documents alphabetically or in numerical order.
8. Interact tactfully and diplomatically with a variety of audiences, including frustrated, angry, or otherwise emotional individuals.

**Ability to:**

1. Demonstrate commitment towards completing assignment work (i.e., work ethic) and producing desired results.
2. Be flexible in adapting to changing priorities and new workloads.
3. Treat individuals with fairness, courtesy, and respect.
4. Work cooperatively and productively as a member of a team to achieve a common goal.
5. Maintain a positive attitude, accept constructive feedback, and not take it personally, in order to improve performance.
6. Listen carefully and give full attention to what others are saying, asking questions as appropriate and not interrupting at inappropriate times.
7. Learn new information and retain information that has been presented previously to successfully perform duties.
8. Apply departmental policies and procedures in the completion of work assignments.
9. Use tact and good judgment when speaking to others.
10. Relate well to individuals with diverse background.
11. Work under pressure and meet production standards.
12. Analyze situations accurately and take effective action.
13. Maintain a clean, organized and safe work area.
14. Read and understand written material to determine the main ideas or essential message.
15. Recognize questions or situations outside of your duties and responsibilities and refer them to the proper place for resolution.
16. Complete tasks that require repetitive hand, wrist, arm, or shoulder actions.
17. Sit, stand, bend, stoop or reach for prolonged periods of time.
18. Effectively sort and organize information using a preset sequence of number or letters.

## **BENEFITS**

To learn more about the comprehensive benefit package please visit our website at <http://www.calpers.ca.gov>.

## **VETERANS PREFERENCE**

Veterans' Preference credits will be added to the final score of all competitors who are successful in this examination and who qualify for, and have requested, these points through the State Personnel Board. Due to changes in the law, effective January 1, 1996, Veterans who have achieved permanent civil service status are not eligible to receive veteran's preference credits.

## **CAREER CREDITS**

Career Credits will not be added to the final score of this examination.

## **SELECTION PLAN**

It is anticipated the written examination will be conducted in June/July 2012. Candidates who meet the minimum qualifications will be contacted by mail with specific date(s), time, and location.

The examination will be conducted in Sacramento.

## DISTINGUISHING CHARACTERISTICS

Aptitude and willingness to assume increasing responsibility and follow a prescribed routine; adaptability; dependability; and willingness to work day, swing, or night shifts, as required.

## CONTACT INFORMATION

For additional information regarding this examination, please contact the Franchise Tax Board Examination/Certification Unit at (916) 845-3608.

## DISCLAIMER

Please click on the link below to review the official California State Personnel Board class specification:

<http://spb.ca.gov/jobs/resources/jobspecs.htm>

## GENERAL INFORMATION

**The Franchise Tax Board (FTB)** reserves the right to revise the examination plan to better the needs of the service if the circumstances change under which this examination was planned. Such revision will be in accordance with civil service laws and rules and all candidates will be notified.

**It is the candidate's responsibility for an examination without a written feature** to contact the Franchise Tax Board three weeks after the final filing date if he/she has not received any notification.

**It is the candidate's responsibility for an examination with a written feature** to contact the Franchise Tax Board six weeks after the final filing date if he/she has not received any notification.

**If a candidate's notice was not received** due to a verified postal error, he/she will be rescheduled upon written request. It is the candidate's responsibility to contact the Franchise Tax Board at (916) 845-3608.

**Examination Locations:** When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations of interviews or performance evaluations may be limited or extended as conditions warrant.

**Examination Applications are available** at [www.jobs.ca.gov](http://www.jobs.ca.gov), State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

**If you meet the requirements** stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

**Candidates needing special testing arrangements** due to a disability must mark the appropriate box on the application and/or contact the testing department.

**General Qualifications:** Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

**If Promotional Examinations Only:** Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at departmental personnel offices, at the State Personnel Board office or [www.jobs.ca.gov](http://www.jobs.ca.gov).

**If High School Equivalence is Required:** Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis. **NOTE: For peace officer classifications please refer to the testing department for special requirements.**

**Veterans' Preference Points:** California Law (Government Code 18971-18978) allows the granting of Veterans' Preference Points in Open entrance and Open, Non-Promotional entrance examinations. Veterans' Preference Points will be added to the final score of all competitors who are successful in these types of examinations, and who qualify for and have requested these points by mail. **In Open entrance examinations, Veterans' Preference Points are granted as follows:** 10 points for veterans, widows, and widowers of veterans, and spouses of 100% disabled veterans; and 15 points for disabled veterans. **In Open, Non-Promotional entrance examinations, Veterans' Preference Points are granted as follows:** 10 points for veterans and 15 points for disabled veterans. Employees who have achieved permanent State civil service status are not eligible to receive Veterans' Preference Points. Permanent State civil service status means the status of an employee who is lawfully retained in his/her position after completion of the applicable probationary period. This includes permanent intermittent, part-time, and full-time appointments. In addition, individuals who at any time achieved permanent State civil service status and subsequently resigned or were dismissed from State civil service are not eligible to receive Veterans' Preference Points. Veteran status is verified by the State Personnel Board (SPB). Directions to apply for Veterans' Preference Points are on the Veterans' Preference Application (STD. Form 1093) which is available at [www.spb.ca.gov](http://www.spb.ca.gov) or from the State Personnel Board, 801 Capitol Mall, Sacramento, CA 95814 and the Department of Veterans Affairs.

**Felony Disqualification:** You are disqualified from being employed as a peace officer if: (1) You have been convicted of a felony in California or any other state; (2) you have been convicted of any offense in any other state which would have been a felony if committed in California; (3) you have been charged with a felony and adjudged by a superior court to be mentally incompetent; (4) you have been adjudged addicted or in danger of becoming addicted to narcotics, convicted, and committed to a State institution. If you have been convicted of a felony, you may be allowed to participate in this examination if your conviction(s): (1) has/have been sealed under Penal Code Section 851.7, 851.8, 1203.45, or Health and Safety Code Section 11361.5; (2) has/have been expunged or is/are expugnable pursuant to Health and Safety Code Section 11361.5 regarding marijuana offenses; (3) was/were stipulated or designated to be a lesser included offense of marijuana possession under Health and Safety Code Section 11557 or 11366.

**TDD** is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TDD Device. California Relay Service (Telephone) for the deaf or hearing impaired.

From TDD phones: 1-800-735-2929 or from voice phone: 1-800-735-2922

**Franchise Tax Board, Examination/ Certification Unit, P.O. Box 550, Sacramento, CA 95812-0550, (916)845-3608. Website: [www.ftb.ca.gov](http://www.ftb.ca.gov)**